GNEC Student Information System

How to Integrate with OPALS Library System

GNECsis has the functionality to add patrons to the OPALS based on students, faculty and staff in GNECsis. You can either manually extract and upload the files individually to your OPALS server, or with some configuration have them transfer to the OPALS server automatically.

Limitation of the Integration

Because the status is selected via the OPALS import process, the only way to inactivate individuals in bulk is to first do this manually in OPALS for the patron type (as a bulk process) and then take the patron list for that type and upload it again. That will mark the inactive people correctly but then reset those that are active when the new load is imported. We are hoping that with the OPALS changes that are coming that the status will be an import field option so that in GNECsis a patron can be marked as inactive and then they will automatically be inactive in the system. For now, when a person becomes inactive in OPALS (you want them disabled from login) then you can mark them individually or in bulk but make sure you also blank out their patron type in GNECsis so they do not get reactivated.

Setup Patrons on GNECsis

1. Make sure the GNECsis values for SystemAdministration/Host/General – Batch File Path (should be a physical path on the server (e.g. C:/Program Files…) and the Batch Base URL: (should be URL path for the batch directory (e.g. http://gnecsis.school.edu/custom/batch/)- both with ending slashes.
2. Have the GNECsis administrator create the Patron Types in GNECsis to be the same as the Patron Types you are using in OPALS. This is done as follows:
    a. Go to System Administration/Pick Lists and edit the one for PatronType
    b. For the Internal Value use something that is similar to the OPALS patron for the patron files. NOTE: These must be unique.
    c. For the External Value – use the exact same text as is used in OPALS (under Administration/User Types/Type. It is highly recommended to not use spaces or special punctuation in the user type name as this will be your filename.
3. In GNECsis, go to Academics and search for the student or faculty member you are looking to add to the patron export.
    a. For a student:
        i. Go to the Personal Info page
        ii. Click "Edit"
        iii. Under Profile change the Patron Type to the appropriate one created in the previous step.
        iv. If your patron barcodes are the same as the GNECsis campusID you can leave this blank. If you use a different barcode for some people or all, then, add your barcode in the box for "Patron barcode". By default, the campusID

is generated but this Patron barcode field will be exported instead if there is a value in there.

    v. Save

b. For a faculty member, you can do the same: Search, edit, then under Profile provide the correct information.

c. Make sure that the individual has a preferred email address defined, as this is required.

d. If the individual is not a faculty member or student, you can go to the People search, find the person, then under profile put in this information. NOTE: The person must have a CampusID in order to be exported so make sure this is generated (via the button option on the page) if there is not one defined.

Setup Transfer to OPALS Server

a. Go to Academics/Administration

b. Select Create "OPALS Patron Lists"

c. Select Configure Transfer

d. Here you need to put in a short identifier for your school that would be unique to it. For example, NTC Manchester could use NTCM, NTC South Africa could use NTCSA. This will be put as a prefix to the files sent to OPALS to distinguish your files from another schools files. You will need to work with the OPALS team to have them setup the process for you so after the files are sent, they will be loaded into your system. This will occur in a morning process usually around 05:00 but they can tell you when for sure this will happen at your institution.

e. Tick the Enable Transfer button for this to be available.

Export the Patron List for Manual Uploading

a. Go to Academics/Administration

b. Select Create "OPALS Patron Lists"

c. Once you are there, you will see the different lists you have defined (see figure 1 below). Click on "Generate Lists" in order to do the actual creation of the CSV files.

d. These files are placed in the "batch" directory of the GNECsis server. You can also use the download get to them directly.

e. NOTE: If there is an error in generating the file, you will either get a pop-up message that the files cannot be created or an error file in the case of data errors (such as the required campus ID is not available for the patron). In the latter case, there will be a link to a file with the errors.

Academics > Administration > OPALS Patron List			Configure Transfer	Generate and Send	Generate	Return

Type	Number	File
Alumni	116	Download File
Community		-
Courtesy	2	Download File
D.Min	42	Download File
Faculty	39	Download File
ILL		-
Student	645	Download File

OPALS Import Process (Manual Downloads)

1. Login as an administrator or with access rights to import patrons.
2. Go to Users/Import

3. Click on Browse… to select the file that you downloaded. Then click Upload.
4. Assign the fields as follows:
   a. Gender: Gender
   b. First Name: firstname
   c. Middle Name: middlename
   d. Last Name: lastname
   e. Email: email
   f. User barcode: userbarcode
   g. Student ID: sid
   h. Username: you can leave this blank (if you are just using usernames as pins), or select sid for the CampusID or select username to use the gnecsis username. Talk with the OPALS team for the best option for your school.

5. Select which category code (Patron Type) you are importing.
6. Now click "Import"

Export the Patron List and Transfer Files to OPALS Server

a. Go to Academics/Administration
b. Select Create "OPALS Patron Lists"
c. Make sure you have setup the Transfer based on the instructions above.
d. Click the "Generate and Send" button. This will transfer the file to the OPALS server.
e. With a batch process, the OPALS group will import these files to your OPALS instance. They will indicate when you can expect this to happen each day.

Academics > Administration > OPALS Patron List	Configure Transfer	Generate and Send	Generate	Return

Type	Number	File
Alumni		_
Community		_
Courtesy		_
D.Min		_
Faculty		_
ILL		_
Student		_

Automated Export

You can also use a scheduled task to cause the batch process to occur at regular intervals. You will run the following file:

http://localhost:8080/nazsis/nIntegExOPALSTransfer.jsp

Where **http://localhost:8080** will be replaced with the proper domain for your installation.

It is recommended to at first do a manual transfer with the Generate and Send Button and have OPALS look at your files to make sure all looks well. Once that is done, they you can automate the process so it just happens for you in the background.

Password Options

OPALS provides various ways to integrate for passwords. The two most readily available ones for GNECsis users are:

1. LDAP (preferred) – If your school is using LDAP, the OPALS system can be configured to look to your LDAP server for the password. If the username has been given the same in GNECsis, LDAP, and OPALs, the same username and password is able to be used by the patron. If the username is not defined in LDAP or is different, then it will default to using the password internal to OPALs.

2. No password – it is possible in the usertype section to disable the checking of passwords. In this way, the student only enters his/her username to get into OPALs and skips putting anything in the password box. While this is an easy option to implement, it has all of the security issues associated with logins that do not have passwords.
3. Password provided in transferred file – this is currently not an option as the password is overwritten upon subsequent updates of the files. A request has been made to have these passwords not updated after the initial creation of the password. The problem being, that if a user changes their password, the integration would change it back to some default password which will be confusing to the user. This could be a feature added in the future with changes done by the OPALs team.